

CHRIS User Guide: Completing an Annual Appraisal

CHRIS Responsibility Required: Manager Self-Service

Module Overview

Purpose

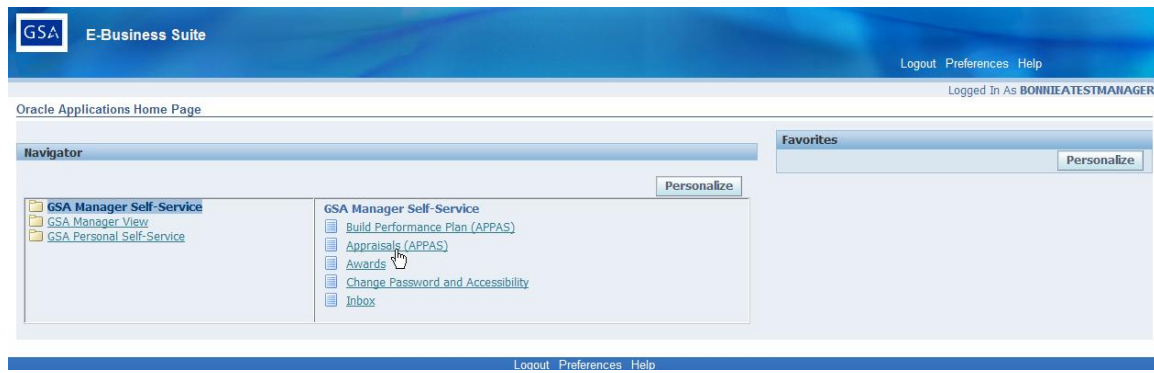
As part of the automation of the APPAS policy, supervisors can manage performance evaluations and appraisals through CHRIS Self-service. This automation includes issuing performance plans, and conducting mid-year/interim/annual appraisals. Once the annual appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the annual in the Appraisals section of APPAS. This guide offers instructions for completing the annual appraisal.

Chapter Contents

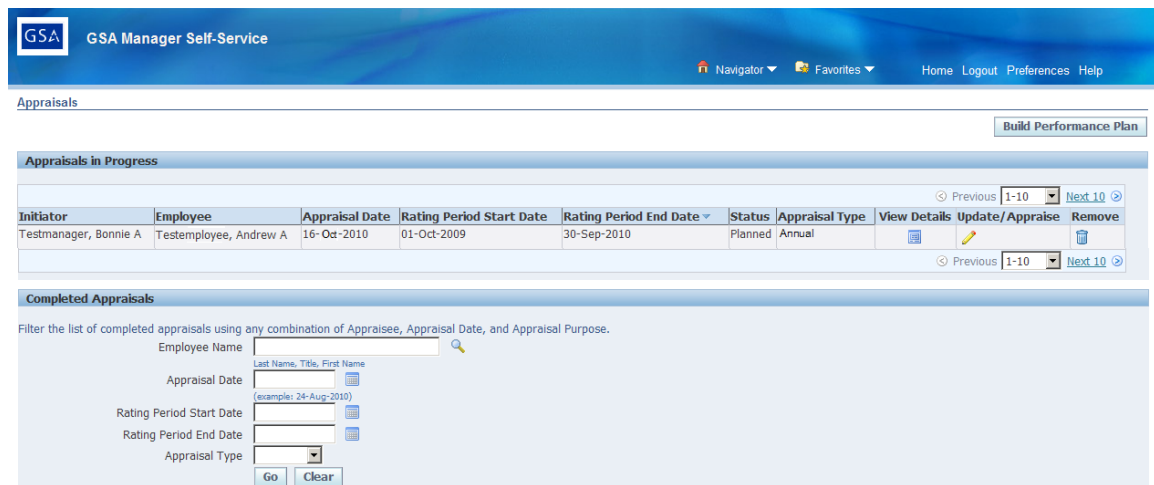
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Locating the Appraisal


After logging in to CHRIS, click on the **GSA Manager Self-Service** responsibility, then select the **Appraisals (APPAS)** menu option.

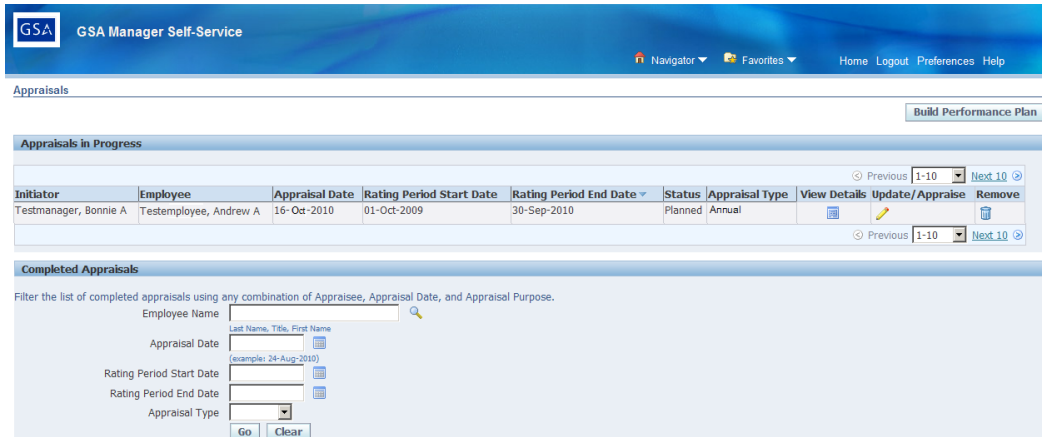


This will take you to the **Appraisals** screen, which is separated into two sections: **Appraisals in Progress** and **Completed Appraisals**. **Appraisals in Progress** gives you a list of Appraisals that you created in **Build Performance Plan**. These are the appraisals we will be working with, in this user guide.



Completing the Appraisal

To begin the process of completing the appraisal, select the **Update/Appraise** icon , in the row of the respective employee.






GSA Manager Self-Service

Appraisals

Build Performance Plan

Appraisals in Progress

Initiator	Employee	Appraisal Date	Rating Period Start Date	Rating Period End Date	Status	Appraisal Type	View Details	Update/Appraise	Remove
Testmanager, Bonnie A	Testemployee, Andrew A	16-Oct-2010	01-Oct-2009	30-Sep-2010	Planned	Annual			

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Employee Name:


Appraisal Date:

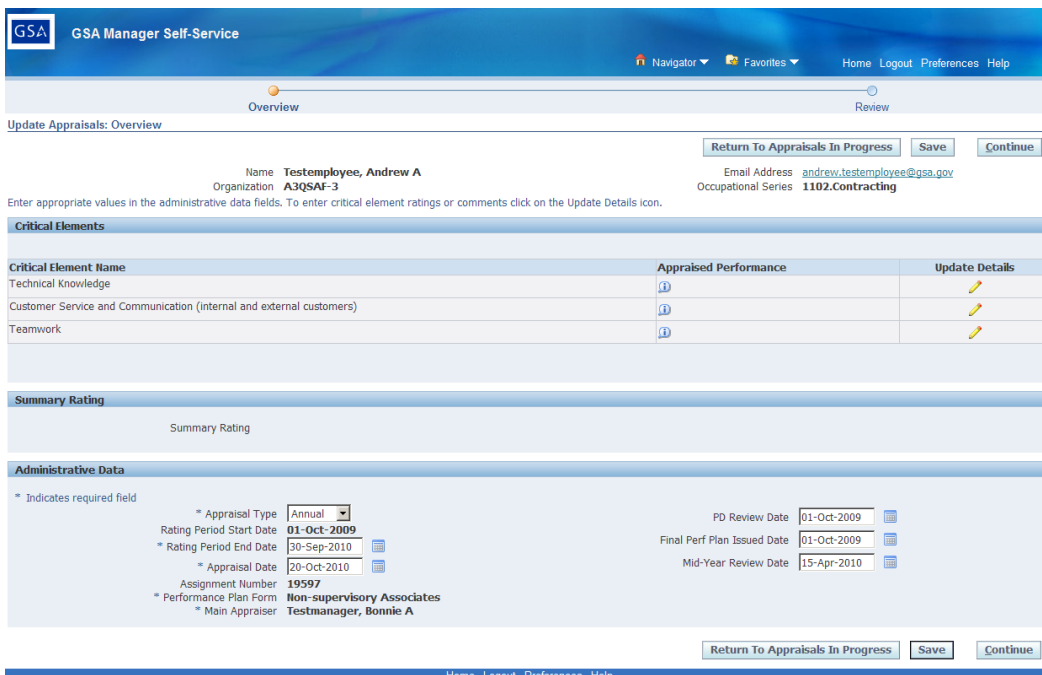
Rating Period Start Date:

Rating Period End Date:

Appraisal Type:

Go Clear

The **Update Appraisals: Overview** screen allows the user to modify the **Appraisal Type**, **Rating Period End Date**, **Appraisal Date**, **PD Review Date**, **Final Performance Plan Issued Date**, and **Mid-Year Review Date**. Once these dates are confirmed as accurate, select the **Save** button. Next, begin the rating process by selecting the **Update Details** icon , in the row of the 1st critical element.



GSA Manager Self-Service







Update Appraisals: Overview

Return To Appraisals In Progress Save Continue

Name: Testemployee, Andrew A
Organization: A3QSAF-3
Email Address: andrew.testemployee@gsa.gov
Occupational Series: 1102.Contracting

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments click on the Update Details icon.

Critical Elements

Critical Element Name	Appraised Performance	Update Details
Technical Knowledge		
Customer Service and Communication (internal and external customers)		
Teamwork		

Summary Rating

Summary Rating

Administrative Data

* Indicates required field

* Appraisal Type: Annual
Rating Period Start Date: 01-Oct-2009
* Rating Period End Date: 30-Sep-2010
* Appraisal Date: 20-Oct-2010
Assignment Number: 19597
* Performance Plan Form: Non-supervisory Associates
* Main Appraiser: Testmanager, Bonnie A

PD Review Date: 01-Oct-2009
Final Perf Plan Issued Date: 01-Oct-2009
Mid-Year Review Date: 15-Apr-2010

Return To Appraisals In Progress Save Continue

Home Logout Preferences Help

Select a rating level, and include your comments for the employee's performance, in regard to the critical element. You may type these comments directly into the field, or copy and paste them from a Word document. Once this is complete, select the **Save and Update Next** button, to rate the next critical element.

Important: The **Appraiser Comments** field will accept the first 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

The screenshot shows the 'Update Critical Elements' page in the GSA Manager Self-Service system. The page has a blue header with the GSA logo and navigation links. Below the header, there's a breadcrumb trail: 'Overview' > 'Review'. The main content area is titled 'Update Critical Elements' and includes a note: '* Indicates required field'. The form displays the following information:

- Critical Element: **Technical Knowledge**
- Start Date: **01-Oct-2009**
- Percentage: **40**

Below this information is a section titled 'Rate On This Critical Element'. It contains two main fields:

- Appraised Performance:** A dropdown menu with options: 1-Level 1, 2-Level 2, 3-Level 3, 4-Level 4, and 5-Level 5. The '2-Level 2' option is currently selected.
- Appraiser Comments:** A large text area for entering comments.

To the right of these fields is a section titled 'Details Specific Measure' with three expandable items:

- [Show](#) Knowledge of acquisition policies, procedures, guidance, regulations, and laws (ie. FAR, GSAM, GSAR, etc.)
- [Show](#) Work Accuracy
- [Show](#) Project funds management

At the bottom of the form are three buttons: 'Back', 'Save and Update Next', and 'Save'.

Continue the process of selecting a rating, typing in comments, and clicking the **Save and Update Next** button, until you reach the last critical element. Once you reach the last critical element, select the **Save** button, after including your rating and comments.

The screenshot shows the 'Update Critical Elements' page in the GSA Manager Self-Service system, now for the 'Teamwork' critical element. The page layout is similar to the previous one, with the same blue header and navigation links. The breadcrumb trail is 'Overview' > 'Review'. The main content area is titled 'Update Critical Elements' and includes the note: '* Indicates required field'. The form displays the following information:

- Critical Element: **Teamwork**
- Start Date: **01-Oct-2009**
- Percentage: **30**

Below this information is a section titled 'Rate On This Critical Element'. It contains two main fields:

- Appraised Performance:** A dropdown menu with options: 1-Level 1, 2-Level 2, 3-Level 3, 4-Level 4, and 5-Level 5. The '2-Level 2' option is currently selected.
- Appraiser Comments:** A large text area for entering comments.

To the right of these fields is a section titled 'Details Specific Measure' with one expandable item:

- [Show](#)

At the bottom of the form are two buttons: 'Back' and 'Save'.

Now that a rating has been issued for all of the critical elements, you have the opportunity to review the ratings that you have issued, as well as make any last changes to the appraisal dates. Once confirmed as accurate, select the **Continue** button.

GSA Manager Self-Service

Update Appraisals: Overview

Name: Testemployee, Andrew A
Organization: A3QSAF-3

Email Address: andrew.testemployee@gsa.gov
Occupational Series: 1102.Contracting

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments click on the Update Details icon.

Critical Element Name	Appraised Performance	Update Details
Technical Knowledge	3-Level 3	[Pencil Icon]
Customer Service and Communication (internal and external customers)	3-Level 3	[Pencil Icon]
Teamwork	3-Level 3	[Pencil Icon]

Summary Rating
Summary Rating: 3-Level 3

Administrative Data

* Indicates required field

* Appraisal Type: Annual
Rating Period Start Date: 01-Oct-2009
* Rating Period End Date: 30-Sep-2010
* Appraisal Date: 20-Oct-2010
Assignment Number: 19597
* Performance Plan Form: Non-supervisory Associates
* Main Appraiser: Testmanager, Bonnie A

PD Review Date: 01-Oct-2009
Final Perf Plan Issued Date: 01-Oct-2009
Mid-Year Review Date: 15-Apr-2010

Return To Appraisals In Progress | Save | Continue

The **Update Appraisals: Review** screen allows you to review the appraisal data, in a non-editable format. If you must make any revisions, select the **Back** button. Otherwise, select the **Continue** button.

GSA Manager Self-Service

Update Appraisals: Review

Name: Testemployee, Andrew A
Organization: A3QSAF-3

Email Address: andrew.testemployee@gsa.gov
Occupational Series: 1102.Contracting

Please review the performance plan data. To make changes, such as changing a critical element or percentage, click the Back button. Once you have reviewed the completed performance plan, click the continue button.

Administrative Data

Initiator: Testmanager, Bonnie A
Appraisal Type: Annual
Rating Period Start Date: 01-Oct-2009
Rating Period End Date: 30-Sep-2010
Performance Plan Form: Non-supervisory Associates

Main Appraiser: Testmanager, Bonnie A
Appraisal Date: 20-Oct-2010
Final Perf Plan Issued Date: 01-Oct-2009
Mid-Year Review Date: 15-Apr-2010

Critical Elements

Show All Details | Hide All Details

Critical Element Name	Appraised Performance
Technical Knowledge	3-Level 3
Customer Service and Communication (internal and external customers)	3-Level 3
Teamwork	3-Level 3

Return to Top

Cancel | Preview | Continue | Back

If you must change the main appraiser for the appraisal, select the **Change Main Appraiser** button. Otherwise, select the **Summary Ratings and Comments** button.

The screenshot shows the 'Main Appraiser Review' page in the GSA Manager Self-Service system. The page has a blue header with the GSA logo and navigation links. Below the header, there's a confirmation message: 'Your changes have been saved.' The main content area is divided into sections: 'Administrative Data' and 'Critical Elements'. In the 'Administrative Data' section, there's a 'Change Main Appraiser' button. The 'Critical Elements' section shows a table with 'Details' and 'Appraised Performance' columns. The table has three rows: 'Technical Knowledge' (3-Level 3), 'Customer Service and Communication (internal and external customers)' (3-Level 3), and 'Teamwork' (3-Level 3). At the bottom, there are buttons for 'Return To Appraisals In Progress', 'Edit Appraisal Data', and 'Summary Ratings and Comments'.

Details	Appraised Performance
Technical Knowledge	3-Level 3
Customer Service and Communication (internal and external customers)	3-Level 3
Teamwork	3-Level 3

The **Summary Ratings and Comments** screen allows you to include your **Summary Rating Overall Comments**, and **Development and Training Comments**. You may type these comments directly into the field, or copy and paste them from a Word document. Once completed, select the **Save and Continue** button.

Important: The **Summary Rating Overall Comments** and **Development and Training Comments** fields will each accept up to 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

The screenshot shows the 'Summary Ratings and Comments' page in the GSA Manager Self-Service system. The page has a blue header with the GSA logo and navigation links. Below the header, there's a breadcrumb trail: 'Change Main Appraiser > Main Appraiser Review > Summary Ratings and Comments'. The main content area is divided into sections: 'Critical Elements' and 'Summary Rating and Comments'. In the 'Summary Rating and Comments' section, there's a 'Summary Rating' field with a dropdown menu showing '3-Level 3'. Below this is a large text area for 'Overall Comments'. In the 'Development and Training' section, there's a large text area for 'Comments'. At the bottom, there are buttons for 'Back', 'Edit Appraisal', 'Save', and 'Save and Continue'.


Summary Rating
3-Level 3

Overall Comments

Comments

Submitting the Appraisal

You are now viewing the **Final Review** screen. If you have not met with the employee, do not submit the appraisal. Rather, generate a PDF of the appraisal by selecting the **Printable Form** button, which you can share with the employee. Once the meeting has taken place and you are ready to submit, return back to this screen. If your rating is a level 1 or level 5, the appraisal will require a 2nd level of approval. You may use the **Comments to Approvers** field, and the attachment functionality, to offer support for the rating to the 2nd level approver. **Note:** the comments to the approver and the attached files will not stay with the appraisal, once the appraisal is submitted in CHRIS. They are used only in the approval process, as a means to include additional support for the 2nd level approver. Once the appraisal is confirmed as accurate, select the **Submit** button.

 **GSA Manager Self-Service**

[Navigator](#) [Favorites](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Change Main Appraiser](#) > [Main Appraiser Review](#) > [Summary Ratings and Comments](#) >

Final Review
To make changes to the appraisal click on the Back button. Summary ratings of 1 and 5 require second level approval. Verify approver routing below and make changes if necessary. If you have not met with your employee, do not submit the appraisal. Generate a PDF file of the appraisal to share with the associate by clicking on PRINTABLE FORM. Once you have printed out the form, click on RETURN TO APPRAISALS IN PROGRESS to begin evaluating another employee. If you have met with your employee and are ready to submit the appraisal, click on SUBMIT.

[Return To Appraisals In Progress](#) [Back](#) [Edit Appraisal](#) [Submit](#) [Printable Form](#)

Name **Testemployee, Andrew A**
Organization **A3QSAF-3**

Email Address andrew.testemployee@gsa.gov
Occupational Series **1102.Contracting**

Critical Elements
[Show All Details](#) | [Hide All Details](#)

Details	Critical Element Name
Show	Technical Knowledge
Show	Customer Service and Communication (internal and external customers)
Show	Teamwork

Summary Rating and Comments
Summary Rating **3-Level 3**
Overall Comments **Andrew continues to be a strong contributor to the division. Great job, Andrew.**

Development and Training
Comments **Andrew has expressed interest in Project Management training. Together, we will evaluate several available PM programs for the upcoming fiscal year.**

Reviewing Officials
To remove a reviewing official from the list, click on the "Delete" icon. To add a reviewing official, click on "Add Reviewing Official" and then use the flashlight or enter a last name and hit your TAB key to search for the appropriate reviewing official.

Line No	Reviewing Official	Category	Delete
No Approvers			

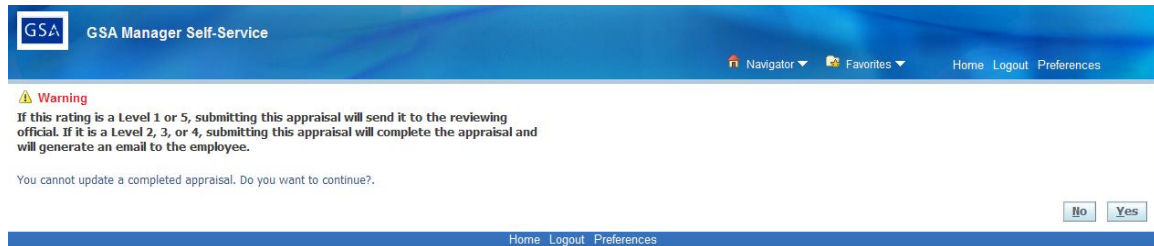
Comments to Approvers

Additional Information
Attachments
To help approvers understand the request, you can attach supporting documents, images, or links to this action.
None [Add](#)

[Return To Appraisals In Progress](#) [Back](#) [Edit Appraisal](#) [Submit](#) [Printable Form](#)

[Home](#) [Logout](#) [Preferences](#) [Help](#)

The **Warning** screen appears, notifying you that a level 1 or 5 will be submitted to a 2nd level approver, and a level 2, 3, or 4 will generate an email to the employee. If you are ready to submit the appraisal, select **Yes**.



The confirmation message appears, confirming that the appraisal has been completed, or submitted for approval. To continue completing appraisals, look for the next appraisal under **Appraisals in Progress**. If the appraisal has not been created, select the **Build Performance Plan** button, to be taken to **Manager Self-Service → Build Performance Plans**.

